

Guide

EDI Policy Guidance



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hello@subscribetoinclusion.com

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Introduction

Welcome to the EDI Policy Guide!

In modern-day workplaces, promoting an inclusive environment is not only a legal obligation under the Equality Act 2010, but also a crucial factor for organisational success, specifically staff retention, health and wellbeing, and productivity.

This guidance document is intended to empower HR professionals, managers, and employees to confidently develop and implement an effective equality, diversity, and inclusion (EDI) policy.

We cover central aspects of the policy body and structure, and key considerations and collaborations in the development process.



Defining the Policy Scope and Applicability

Begin your EDI policy by clearly outlining its scope and applicability. A policy scope restricts the application of the standards laid out in its contents and identifies the individuals and/or groups consulted, considered, and included.

Specify the organisational departments, teams, visitors, or other stakeholders covered by the policy. It is essential to address whether the policy extends to contractors, clients, and other external parties. For transparency, include the date from which the policy comes into effect. This section helps the success of your policy by setting boundaries and ensuring a consistent approach across the organisation.



Defining the Purpose of the Policy

Plainly outline the purpose of the policy. This should include emphasising the policy's role in upholding the organisations legal responsibilities under the Equality Act 2010, Public Sector Equality Duty, Regulatory standards, and/or any internal strategies or commitments to equality, diversity, and inclusion.

Collaborative and Bespoke

The policy purpose does not need to be limited to general legal or regulatory obligations. To maximise the effectiveness of your EDI policy, ensure that it is tailored to your organisation's specific needs. Bespoke and targeted insights may be found in Annual EDI Surveys and Reports, Regulatory Body Reports and Benchmarking, Equality Charter Insights, Staff Network work streams, and engaging with high-impact or high-interest key stakeholders.



Providing Key Definitions

Providing definitions helps eliminate ambiguity within the policy and explicitly validates those considered and included. It is important to create a shared understanding of the policy content and consequences.

Include a comprehensive overview of key definitions relating to equality, diversity, inclusion, and protected characteristics. Often, these terms are used interchangeably, which can cause confusion. Further definitions support the policy's cultural and disability accessibility.

Remember to be mindful of the trends and topics most relevant to your organisation. For example, organisations may have specific challenges influenced by Caste discrimination which would not be captured by the Equality Act 2010 protected characteristics, other organisations may need to extend protections to commuters or those experiencing other disproportionate geographical challenges.

Identifying Principles and Objectives

Principles and objectives should be in line with the purpose of the policy and be used to guide decision-making within the organisation.

Principles identify the foundational guiding rule or idea. This might include promoting fairness, equity, and inclusion.

Objectives emphasise what your EDI policy aims to achieve. Objectives might aim to diversify the workforce, reduce disparities in recruitment, and increase access to development opportunities. Ensure objectives are measurable to track the policy's effectiveness.



Outlining Roles and Responsibilities

Clearly outline the roles and responsibilities of employees, managers, and HR staff. For instance, managers should ensure team compliance with the policy, participate in training, and address discrimination reports promptly. Regular training and accountability measures are crucial.

This section should outline expectations for behaviour, including any mandatory participation in training programs, engagement with reporting mechanisms for incidents related to discrimination or bias, and responsibilities for signposting to Human Resources, Occupational Health, or Employee Assistance Programmes.

Outlining Roles and Responsibilities



Governance and Accountability

Highlight the roles or teams responsible for overseeing the implementation, enforcement, and review of the EDI policy. Different stakeholders are likely to hold these roles, and they may include EDI partners, HR staff, and senior leadership members.

List or signpost to contact information for the effective reporting of concerns and queries related to the policy. It is important to encourage collaboration and feedback throughout the policy lifecycle, even after publication, to maintain the policy's effectiveness.

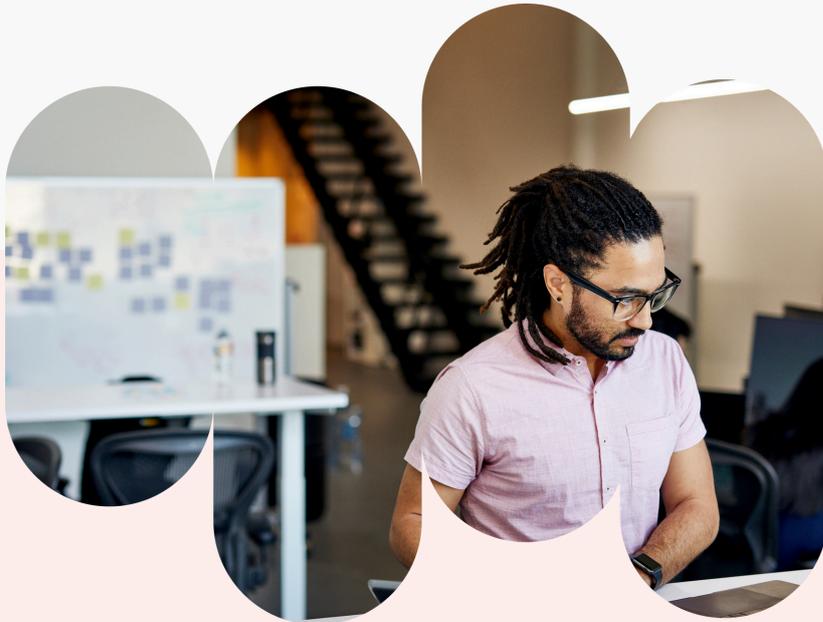
Ensure there are clear mechanisms for reporting and tracking EDI-related issues:

- **Clear Reporting Channels** – Specify how employees and stakeholders can raise EDI-related concerns (e.g., dedicated email, anonymous reporting tool, HR contact).
- **Tracking and Transparency** – Establish a process for logging, tracking, and reviewing reports to ensure accountability and timely action.
- **Roles and Responsibilities** – Define who is responsible for handling reports, investigating concerns, and ensuring follow-ups.
- **Regular Review and Feedback** – Implement periodic reviews of reported issues to identify trends, improve policies, and share learnings.
- **Confidentiality and Support** – Ensure confidentiality and offer appropriate support for those raising concerns, including access to external guidance if needed.



Outlining Roles and Responsibilities

As well as stating the date the policy comes into effect, it is good practice to include an annual review date and the role responsible for actioning this. Regular reviews are necessary to uphold the sustainability of the policy effectiveness in protecting the organisation, its employees, and other stakeholders. If modifications need to be made to the policy and a replacement is created, include a clear signpost to any superseding policies.



Signposting

ACAS

Advisory, Conciliation and Arbitration Service (ACAS)

[Equality, Diversity, and Inclusion: Making your workplace inclusive](#)

Practical advice on fostering an inclusive workplace, covering best practices and legal considerations.

BreatheHR

[Why every business needs inclusive policies](#)

Insights on creating inclusive policies that benefit both employees and businesses.

Gov.uk

[Equality Act 2010: guidance](#)

Official UK government guidance on the Equality Act 2010, outlining legal requirements for organisations.



EDI Policy Template

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Introduction

This template is designed to help your organisation create an informed, accessible, and effective policy for promoting equity and inclusion. A well-implemented EDI policy ensures compliance with legal standards, enhances organisational culture, boosts employee morale, and drives performance.

The following template outlines the essential components needed to make a robust EDI policy, ensuring clarity and consistency across various departments and stakeholders.

From defining the policy's scope and purpose to detailing key principles, roles, and responsibilities, this template provides a structured approach to embedding EDI into operational frameworks.

By leveraging data-driven insights and stakeholder consultations, this template also ensures the policy aligns with legal requirements, such as the Equality Act 2010 and the Public Sector Equality Duty, while being tailored to the unique needs of your organisation. Use this template as a foundational tool to promote fairness, accountability, and sustainability within your workplace

Accessibility Considerations

Text & Readability

- ✓ Use clear fonts (Arial, Calibri, Verdana).
- ✓ High contrast (black text on light background).
- ✓ Left-align text, avoid justification.
- ✓ Use bold for emphasis, not italics/underlining.

Structure & Navigation

- ✓ Use clear headings for easy navigation.
- ✓ Keep text short & use bullet points for readability.
- ✓ Use plain language – avoid jargon.
- ✓ Tables & boxes help highlight key information

Digital Accessibility

- ✓ Ensure the document is searchable (not a scanned PDF).
- ✓ Add alt text for images & use descriptive links.
- ✓ Make it keyboard & screen-reader friendly.

Additional Considerations

- ✓ Consider a Plain English summary.
- ✓ Offer alternative formats (large print, audio, Easy Read).
- ✓ Consider a Dyslexia-friendly version (wider spacing, pastel backgrounds).

Template

1

Policy Scope and Applicability

- Clearly outline the scope and applicability of the policy.
- Specify the organisational departments, teams, visitors, or other stakeholders covered by the policy.
- Address whether the policy extends to contractors, clients, and other external parties.
- Include the date from which the policy comes into effect.

For Example:

This policy applies to all employees, including full-time, part-time, and temporary staff, as well as contractors, visitors, volunteers and clients. It covers all workplace settings, including office spaces, remote working environments, and external events. The policy takes effect from 1st March 2025.

2

Policy Principles & Objectives

- Using clear language outlining the purpose of the policy.
- Emphasise the policy's role in upholding legal responsibilities under the Equality Act 2010, Public Sector Equality Duty, regulatory standards, and/or internal strategies and commitments to EDI.
- Tailor the policy to the specific needs of the organisation using relevant data-led insights and consultations with the policy key stakeholders.

For Example:

This policy aims to ensure that our workplace is inclusive, diverse, and free from discrimination. It aligns with the Equality Act 2010 and the Public Sector Equality Duty, ensuring that all employees and stakeholders are treated fairly. The policy is informed by Our Voice survey, staff feedback and diversity characteristics data to address specific challenges within our organisation.

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Key Definitions

- Include comprehensive definitions of key terms related to equality, diversity, inclusion, and protected characteristics.
- Eliminate ambiguity within the policy and ensure a shared understanding of its content and consequences.
- Be mindful to reflect specific challenges or trends that may be unique or specific to the organisation.

For Example:

- **Equality** – Ensuring everyone has access to opportunities, resources and to support according to their individual needs.
- **Diversity** – Recognising and valuing differences in people’s backgrounds and experiences.
- **Inclusion** – Creating an environment where everyone feels respected, valued, and able to contribute.
- **Protected Characteristics** – As defined by the Equality Act 2010, these include age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

4

Policy Principles & Objectives

- Identify the foundational guiding rules or ideas (principles) such as promoting fairness, sustainability, responsibility, accountability, equity, and inclusion.
- Emphasise objectives that the EDI policy aims to achieve, such as diversifying the workforce demographics, reducing disparities in recruitment and promotion, and increasing access to development opportunities.

For Example:

Guidelines:

- Everyone should be treated fairly and with respect. What is good for our people, society and for sustainability, is good for our business.
- Our organisation values diversity of experience, background and thought, and strives for an inclusive culture where those diverse experiences are welcomed.
- We hold ourselves accountable for maintaining an equitable workplace and value psychological safety.

Objectives:

- Increase representation of underrepresented groups in leadership roles.
- Ensure fair and transparent recruitment and promotion processes.
- Provide equal access to training opportunities for all employees.

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Roles and Responsibilities

- Clearly define the roles and responsibilities of employees, managers, and other parties in implementing and upholding the policy's principles and objectives.
- Outline expectations for behaviour, participation in training and development programs, engagement with reporting mechanisms, and responsibilities for signposting to relevant support services.

For Example:

- **Leadership Team** – Owns EDI and is ultimately accountable, always leads by example and role models what good looks like.
- **Employees** – Everyone is responsible for inclusion, we treat our colleagues with respect, we speak up and report any discrimination or bias.
- **Managers** – Responsible for implementing this policy, addressing concerns, and ensuring their teams feel supported and follow best practices.
- **HR Team** – Provides training and ensures compliance with the policy.

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Governance and Accountability

- Highlight the roles or teams responsible for overseeing the implementation, enforcement, and review of the EDI policy.
- List or provide contact information for reporting concerns and queries related to the policy.
- Encourage collaboration and feedback throughout the policy lifecycle to maintain effectiveness.

For Example:

The EDI Leadership Team will oversee the implementation of this policy. Any concerns or questions can be directed to XX@XXXX.com. Employees are encouraged to provide feedback through quarterly EDI forums and our yearly Your Voice survey.

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Policy Review

- Include an annual review date and specify the role responsible for actioning this.
- Ensure regular reviews to uphold the sustainability of the policy's effectiveness.
- Provide clear signposts to any superseding policies if modifications are made.

For Example:

This policy will be reviewed annually, next review is scheduled for March 2026. The Head of HR will be responsible for updating and communicating any changes. The latest and most up to date version will always be accessible via the company intranet.

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